

November 15, 2006

Is Your Gift Annuity Program Sick or Healthy? Diagnosing and Treating Gift Annuity Risk

No matter if you are considering a gift annuity program or are currently offering gift annuities... this presentation will describe how some programs are healthy and some are less so. While there are some excellent tools available that can take assumptions and a database and come up with useful diagnoses, this session will show how to analyze those results and cover some practical steps that can be taken to become or stay healthy through best practices such as: selective reinsurance, adjusting the investment of the funds, gift acceptance policies, and being pro-active about the way funds are removed from the pool.

Learning objectives for this presentation include: Why it is important to review a gift annuity program to see if it is at risk, how to do such an analysis—either a simple or sophisticated one and how to improve a problem gift annuity program.

SPEAKER:

Gary M. Pforzheimer, PG Calc Incorporated: Mr. Pforzheimer is the president of PG Calc Incorporated in Cambridge, MA, which designs, builds, sells and supports planned giving marketing software as well as gift administration software. In May of 1995, Pforzheimer became the seventh recipient of the David M. Donaldson Distinguished Service Award, an award given by the Planned Giving Group of New England (PGGNE) to individuals for special contributions and distinguished service to the planned giving community. He currently sits on NCPG's Board of Directors and is a current member and past board member of PGGNE.

TIME & PLACE: Associated Jewish Community Federation of Baltimore

101 W Mount Royal Ave, Baltimore, MD 21201

PARKING:

Parking is permitted in the garage (across from the Meyerhoff Symphony Hall) adjacent to the ASSOCIATED. Please bring ticket with you for validation.

SCHEDULE:

11:30 - 12:00 p.m. Registration and Networking
12:00 - 12:30 p.m. Lunch and CPGC Business/Announcements
12:30 - 2:00 p.m. Videoconference

NOTE: Approved for 1.5 CE credit hours from the Certified Financial Planner Board of Standards, Inc.

REGISTRATION: Registration should be made in advance. Please complete the form below and mail with your check to: Chesapeake Planned Giving Council, P. O. Box 44123, Baltimore, MD 21236.

Cost:

Pre-registered:

Members: \$35 w/lunch (\$25 w/o lunch)
Non-Members: \$55 w/ lunch (\$45 w/o lunch)

Walk-in:

Members: \$40 w/lunch (\$30 w/o lunch)
Non-Members: \$60 w/ lunch (\$50 w/o lunch)

Program Questions?

Call Rebecca Rothey 410-625-8488
Membership or Registration Questions?
Call Jackie King at 443/678-1186.

Registration & Cancellation Deadline: Thursday, November 9, 2006

Please tear off and return this registration form with a check made payable to Chesapeake Planned Giving Council, P.O. Box 44123, Baltimore MD 21236. Members ONLY may fax their registrations to 410-931-2978. No cover is necessary.

REGISTRATION

*Uniting
Legal,
Financial &
Development
Professionals in
Charitable
Gift Planning*

Name/Title _____

Organization _____ Telephone _____

Address _____

EMAIL ADDRESS _____

I am a CPGC member. Enclosed is my check for \$35

CPGC Members ONLY: Bring your CFO or Investment Committee Chair for FREE

GUEST NAME: _____

I am not a member of CPGC. Enclosed is my check for \$55